



Duty Statement

Request for Personnel Action (RPA) Number 2122-03311	Effective Date
Classification Title Attorney V	Position Number 564-410-5781-XXX
Working Title Tax Counsel V	Bureau and Section Litigation & Settlement Bureau

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the direction of the Deputy Chief Counsel, within the Litigation & Settlement Bureau, as a key member of the Legal Division Team, the Attorney V-Tax Counsel V, independently handles the most complex, difficult and sensitive issues and cases undertaken by the Bureau. The incumbent provides guidance and advice to the Legal and Audit Divisions and the Department on such issues by serving as principal legal technical consultant on matters within the subject matter responsibilities of the Litigation and Settlement Bureau. The incumbent develops and implements complex training for the Bureau and the Division and coordinates training opportunities for Litigation and Settlement Bureau staff with the Audit Division and other Divisions as appropriate. Responsibilities in this Bureau may include: interpreting laws, regulations and court decisions, representing the Department before the Office of Tax Appeals (OTA) and other administrative bodies, drafting and analyzing legislative proposals and bills, promulgating regulations and rendering advice to executive and senior management with respect to other technical and administrative matters, or negotiating settlements of disputed tax matters. The Tax Counsel V does not supervise Tax Counsels or other staff but does provide guidance and assists other Tax Counsels with controversies and policy matters involving the provisions of the Revenue and Taxation Code and the Internal Revenue Code to ensure technical accuracy, completeness and consistency of positions taken by the Bureau.

Essential Functions

Percentage	Description
45%	Handles cases involving the most complex, difficult, and/or sensitive issues as assigned, including without limitation cases falling within the purview of Franchise Tax Board's (FTB) Litigation & Settlement Bureau, as well as representing the Department in various administrative tribunals, including, but not limited to, the State Board of Equalization and/or the State Personnel Board, courts situated both within and outside the State of California, or supporting, collaborating with, and acting as a resource to Deputy Attorneys General or retained private counsel assigned to represent the FTB on the most complex, difficult, and sensitive litigation cases.
20%	Develops, implements, and coordinates training for the Litigation & Settlement Bureau staff and other Legal Division and Department staff as appropriate. Coordinates training opportunities for Litigation & Settlement Bureau staff with other division personnel as appropriate. Participates in enterprise training initiatives and represents the Settlement & Litigation Bureau on enterprise teams as assigned.
15%	Acts as a principal technical/functional consultant to the Legal Division and other divisions within FTB, including, without limitation, Audit, Administrative Services, Accounts Receivable Management, and the Equal Employment Opportunity Office on the most complex, difficult, and sensitive cases and issues within the subject matter responsibility of the Litigation & Settlement Bureau. Exercises broad independent discretion in handling such matters under the general direction of management. Assists management and staff in interpreting and applying the Internal Revenue Code, Revenue and Taxation Code, Civil Code, Bankruptcy Code, Labor Code, Government Code and/or Public Contract Code, and

Percentage	Description
	the regulations and cases thereunder, to the most complex, difficult, and sensitive issues and controversies, and assists in analyzing principles and precedents and applying them to complex legal issues relating to subject matters falling within the scope of responsibilities delegated to the Litigation & Settlement Bureau.
15%	Advises executive and senior management on technical legal aspects of the most important, complex and sensitive issues addressed by the Litigation & Settlement Bureau. Consults with and independently advises management and staff on the most difficult and complex issues in matters falling within the scope of responsibilities delegated to the Litigation & Settlement Bureau; independently researches and recommends positions and actions on such matters. May act as lead counsel reviewing the work of other Litigation & Settlement Bureau attorneys in subject matter areas assigned to the Bureau.